

SECTION M - EVALUATION FACTORS FOR AWARD**CLAUSES INCORPORATED BY REFERENCE**

52.217-5 Evaluation of Options JUL 1990

CLAUSES INCORPORATED BY FULL TEXT

52.222-46 Evaluation of Compensation for FEB 1993
Professional Employees

(a) Recompensation of service contracts may in some cases result in lowering the compensation (salaries and fringe benefits) paid or furnished professional employees. This lowering can be detrimental in obtaining the quality of professional services needed for adequate contract performance. It is therefore in the Government's best interest that professional employees, as defined in 29 CFR 541, be properly and fairly compensated. As part of their proposals, offerors will submit a total compensation plan setting forth salaries and fringe benefits proposed for the professional employees who will work under the contract. The Government will evaluate the plan to assure that it reflects a sound management approach and understanding of the contract requirements. This evaluation will include an assessment of the offeror's ability to provide uninterrupted high-quality work. The professional compensation proposed will be considered in terms of its impact upon recruiting and retention, its realism, and its consistency with a total plan for compensation. Supporting information will include data, such as recognized national and regional compensation surveys and studies of professional, public and private organizations, used in establishing the total compensation structure.

(b) The compensation levels proposed should reflect a clear understanding of work to be performed and should indicate the capability of the proposed compensation structure to obtain and keep suitably qualified personnel to meet mission objectives. The salary rates or ranges must take into account differences in skills, the complexity of various disciplines, and professional job difficulty. Additionally, proposals envisioning compensation levels lower than those of predecessor contractors for the same work will be evaluated on the basis of maintaining program continuity, uninterrupted high-quality work, and availability of required competent professional service employees. Offerors are cautioned that lowered compensation for essentially the same professional work may indicate lack of sound management judgment and lack of understanding of the requirement.

(c) The Government is concerned with the quality and stability of the work force to be employed on this contract. Professional compensation that is unrealistically low or not in reasonable relationship to the various job categories, since it may impair the Contractor's ability to attract and retain competent professional service employees, may be viewed as evidence of failure to comprehend the complexity of the contract requirements.

(d) Failure to comply with these provisions may constitute sufficient cause to justify rejection of a proposal.

M.1 GENERAL

a. Award of the contract resulting from this solicitation will be made to the offeror whose proposal, conforming to the solicitation, represents the best value to the Government, cost/price and other Factors considered. Other Factors shall include all those evaluation Factors and Subfactors set forth in Section M.2. Accordingly, award may be made to other than the lowest priced offeror or other than the highest technically rated offeror.

b. The Government intends to make a single award under this solicitation.

c. The offeror's proposal will be in the form prescribed by this solicitation and shall contain a response to each of the areas identified in Section L which affects the evaluation Factors for award. All proposals will be evaluated for

in accordance with Section M. Proposals that do not conform to the requirements of the solicitation may be rejected without further evaluation, deliberation or discussion. The offer with the best value submitted by a responsible offeror will be awarded the contract

d. Proposals will be evaluated to determine compliance with all requirements of the solicitation, including attachments and exhibits. Proposals will also be evaluated for unique and innovative methods, processes, and/or solutions that are beneficial to the Government. The evaluation criteria will be applied in an identical manner. Each response will be evaluated strictly in accordance with its contents and the Government will not assume that the performance will include areas not specified in the offeror's proposal.

e. The Government intends to evaluate proposals and award a contract without discussions with offerors. Therefore, each initial offer should contain the offeror's best terms from a technical/management and cost/price standpoint. The Government, however, reserves the right to conduct discussions and request proposal revisions, if necessary. If a competitive range is established, the Government may limit the number of proposals to the greatest number that will permit an efficient competition among the most highly rated proposals.

f. The proposal must demonstrate to the Government's satisfaction that the offeror will provide an approach that satisfies each Factor and Subfactor. Proposal information provided for one Factor or Subfactor may be used to assess other Factor and/or Subfactors if the Government deems it appropriate. Strengths and weaknesses of the offeror's proposal, as well as performance risks, will be assessed in determining which proposal(s) is most advantageous to the Government. To receive consideration for award, overall evaluations of not less than "Satisfactory" must be achieved at the Area level.

g. With regard to any understatement of costs, the Government reserves the right to evaluate the cost proposals on the inclusion of all necessary and verifiable items of cost. Any proposal which is materially unbalanced as to costs/prices may be rejected as non-responsive. An unbalanced proposal is one, which is based on costs/prices significantly less than cost for some work, and costs/prices which are significantly overstated for other work.

M.2 EVALUATION CRITERIA

a. This is a best value award, and the evaluation criteria for this award are specified below. The Government will use the offeror's proposal response as a representation of how the offeror will support the Government's requirements should the offeror be selected for award. The Government will compare the offeror's proposed plans and other areas of the offeror's proposal to evaluate the offeror's overall likelihood to implement the task.

b. The following Evaluation Criteria will be used for awarding the Military OneSource contract:

Area A: Technical Approach

Area B: Management Approach

Area C: Subcontracting Plan

Area D: Past Performance

Area E: Cost/Price

M.3 EVALUATION CRITERIA, WEIGHTED

a. Relative Importance of Areas: Technical Approach is equal to Management Approach, followed by, in descending order of importance, Subcontracting Plan, and Past Performance. All non-price factors, when combined, are more important than price.

[[Area A= Area B] > Area C > Area D] > Area E

b. Evaluation Factors other than cost/price, when combined, are more important than Cost/Price. The degree of importance allocated to Cost/Price will increase with the degree of equality of the proposals in relation to the other Areas on which selection is to be based, or decrease when the Cost/Price is so significantly high as to diminish the value of the technical superiority to the Government.

c. Within each Area, all factors are equal to each other, and all subfactors are equal to each other.

M.4 EXPLANATION OF EVALUATION CRITERIA.

Area A: Technical

Factor 1: Approach to Call Center Operations

Subfactor a: Call Center Operational Concept: The Government will evaluate the offeror's understanding of call center operations as they pertain to the Military OneSource program, including telecommunications capabilities and technological infrastructure to assure quality service delivery 24X7, capable of supporting stateside and international calls from Military OneSource Clients. The Government will evaluate the offeror's plans to increase accessibility, including minimization of dropped/abandoned calls and messages. The Government will evaluate business applications; back-up call center capability; availability of real time interpreter/translators for a wide variety of languages; and disaster recovery capabilities. The Government will evaluate the offeror's proposed call flow and work flow from initial call through follow-up. The Government will evaluate offeror's technical infrastructure for getting case information received from all sources into the case management system within three (3) business days.

Standard 1 - The offeror's technical infrastructure supports 24 x 7 call center operations to receive both CONUS and OCONUS calls.

Standard 2 - The offeror's technical infrastructure provides back up call center recovery instantaneously.

Standard 3 - The offeror's technical infrastructure supports real time translation/interpretation.

Standard 4 - The offeror's disaster recovery procedures provide no down time and no loss of data.

Standard 5 - The offeror's technical infrastructure supports increasing accessibility and reducing abandoned calls for the Military OneSource Program.

Standard 6 - The offeror's technical infrastructure supports the requirement to post the Face-to-Face Counseling case summary information to the case management system within 3 business days of receipt.

Subfactor b: Information and Referral: The Government will evaluate the offeror's system (technical infrastructure) for searching available data and information sources to provide Clients information and referrals on the wide array of topics available through Military OneSource.

Standard 1 - The offeror's populated databases support the topics as listed in the SOW.

Standard 2 - The offeror's technical infrastructure supports controlled access to the update/modification of the database.

Factor 2: Approach to Non-Medical (Face-to-Face, Problem-Solving) Counseling -- Case Management Feedback capability. The Government will evaluate offeror's technical infrastructure to support a network of service providers, credentialing and network development, as well as its ability to gather and provide to the 1-

800/Website Contractor feedback from the network of providers about any cases the providers are working within three (3) business days after the final session for a Military OneSource client.

Standard 1 - The offeror has technical infrastructure to support development and credentialing of a network of service providers.

Standard 2 - The offeror's technical infrastructure supports the requirement to provide Face-to-Face and telephonic, non-medical problem-Solving Counseling case summary within three (3) business days.

Factor 3: Systems

Subfactor a: Telecommunications: The Government will evaluate the offeror's telecommunications infrastructure and capacity for supporting 4 million service members and their dependents, including system for real-time monitoring of telephone metrics, reporting capability, Telecommunications Device for the Deaf/TeleTYpewriter (TDD/TTY) technology, skill-based routing, and ability to trace calls in case of an emergency. The Government will evaluate the offeror's compliance with Section 508 of the Workforce Investment Act of 1998 for both voice and data services. The Government will evaluate the offeror's telecommunications and systems capability, and capacity to manage spikes in telephone calls while still maintaining service levels defined in the 1-800/Website QASP (Attachment 1) to assure high quality service delivery.

Standard 1 - The offeror's telecommunications system provides TDD/TTY capability.

Standard 2 - The offeror's telecommunications system provides the ability to trace calls.

Standard 3 - The offeror's system is compliant with Section 508 of Workforce Investment Act of 1998.

Standard 4 - The offeror's telecommunications infrastructure supports real time reporting of telephone service levels.

Standard 5 - The offeror's telecommunications system supports skill based routing.

Standard 6 - The offeror's telecommunications infrastructure supports telephone reporting metrics: 1) Ability to report on percent of calls answered in seconds; 2) Abandon rate; 3) Average hold time between triage and counselor.

Standard 7 - The offeror's telecommunications infrastructure can support the anticipated additional call volume generated as a result of any surge issues, awareness campaigns of the Military OneSource program or changing dynamic in the Global War on Terrorism.

Subfactor b: Case Management: The Government will evaluate the offeror's case management system for ability to handle the myriad of issues needed to support Military OneSource and to assure Client confidentiality while at the same time assuring counselors and other users easy access to information eliminating the need for Clients to repeat basic information on subsequent calls. In addition, offeror must demonstrate its systems for assuring compliance with all relevant sections of the Privacy Act, including the provision of access control in concert with data protection software and procedures. The Government will evaluate databases the offeror uses for information and referrals, including numbers of providers, data available for each provider, system for updating information, etc. The Government will evaluate the offeror's systems for assuring duty to warn/reportable events are reported on time; systems for assuring the correct handling of emergency, urgent, and routine issues; and technology for scheduling follow up calls and other services. The Government will evaluate the offeror's system capability and capacity for assuring that Face-to-Face, Problem-Solving Counseling needs are met when there are spikes in needs/requests while still maintaining suitable controls to assure high quality service delivery. The Government will evaluate the offeror's case management system to determine ease of access while assuring security both at the system level and at the individual level. The Government will evaluate offeror's ability to easily and

quickly provide both monthly reports and ad hoc reports based on data in the case management system. The Government will evaluate the case management system's capacity for handling significant surges. The Government will evaluate offeror's case management capability to assure Open Data Base Connectivity (ODBC) compliance.

Standard 1 - The offeror's case management system is compliant with the Privacy Act.

Standard 2 - The offeror's case management system assures confidentiality while eliminating the need to repeat information on subsequent calls

Standard 3 - The case management system tracks duty to warn cases.

Standard 4 - The offeror's case management system tracks emergent, urgent, and routine issues.

Standard 5 - The offeror's case management system is ODBC Compliant.

Standard 6 - The case management system provides for web-enabled and access-leveled security.

Standard 7 - The offeror's case management system provides a scheduler functionality to support follow-up tracking and the provision of additional services.

Standard 8 - The offeror's case management system provides for easy access to data for report generation.

Factor 4: Oral Presentations (If Required)

4.1 Only those offerors the CO determined to be in the competitive range, if one is established, will be invited to participate in oral presentations of their proposals, if required. This presentation shall serve to augment the ratings for the criteria contained in the written proposal. The CO will establish the competitive range in accordance with the Federal Acquisition Regulation (FAR) 15.306.

4.2 Offerors will be required to present their technical proposal orally at oral presentations in metro Washington, DC area (exact location is to be determined). The oral presentation shall serve to augment the ratings for the criteria contained in their technical proposal. The contracting officer will inform each offeror of the exact time, date, location, and additional instructions prior to the oral presentation. The timing for the presentation will be determined via a random lottery selection with no preference given to any offeror involved. The offeror will have no more than 60 minutes to make their presentation. A question and answer session may take place following the offeror's presentation. Price shall not be discussed at oral presentations. A hard copy of the offeror's oral presentation shall be submitted if the CO deems oral presentations are required. No changes shall be made to the oral presentation after the submission of hard copy; doing so will result in disqualification of the offeror from this competition. A screen for PowerPoint viewing will be available, upon request. However, all other electronic materials must be supplied by the offeror.

Area B: Management

Factor 1: Approach to Managing 1-800/Website Operations

Subfactor a: Approach to Meeting 1-800 Call Center Requirements: The Government will evaluate the offeror's approach in managing call centers offering the variety of services available through Military OneSource including the offeror's ability to recruit, hire, manage, train, and retain professional staff with pertinent and validated educational credentials and experience in accordance with the qualification levels defined in the PWS. The Government will evaluate the offeror's proposed training programs for staff supporting Military OneSource program to include the methodology for assuring staff are military savvy

and understand military terminology and the issues facing service men and women and their dependents. The Government will evaluate the offeror's ability to provide educational/informational materials to support the broad array of topics covered through Military OneSource. The Government will evaluate the offeror's protocols and procedures for warm hand-offs and for duty to warn situations. The Government will assess the offeror's process and procedures for managing incoming phone calls and providing telephone counseling/consultation, education, and information while minimizing Military OneSource Client consultations with multiple counselors/consultants. The Government will evaluate the offeror's processes and procedures for duty to warn situations. The Government will evaluate the offeror's approach in servicing clients around the world. The Government will also evaluate the offeror's ability to assure back up call center staff are properly trained and available should there be a need. The Government will evaluate the offeror's ability to meet performance metrics as outlined in the QASP, and the offeror's ability and plans for managing peaks in service requests. The Government will evaluate the offeror's procedure to minimize the numbers of dropped/abandoned calls and messages.

Standard 1 - The offeror's management processes and business practices demonstrate the experience to manage the Military OneSource program.

Standard 2 - The offeror's management processes, tools and technical expertise integrate all elements of the Military OneSource requirements to support and maintain a system of counselors and care managers at a level of readiness over the efforts intended lifetime. This includes support equipment, facilities, training and informational/education materials and distribution of all materials required to meet the needs of the Client(s).

Standard 3 - The offeror has established processes and procedures to support the warm hand-off of Clients to other providers and community resources.

Standard 4 - The offeror has established initial assessment processes and procedures to quickly identify the Clients' needs.

Standard 5 - The offeror's management processes and procedures support the ability to provide services to Clients worldwide.

Standard 6 - The offeror's management processes provide back up call center support as needed.

Standard 7 - The offeror has established management processes and procedures to meet peak usage periods.

Standard 8 - The offeror has established management processes and procedures for managing spikes in call volume.

Standard 9 - The offeror has established management processes and procedures for handling and tracking emergency, urgent and routine issues.

Standard 10 - The offeror has processes and procedures for minimizing dropped/abandoned calls and the number of messages that are taken.

Standard 11 - The offeror has established processes and procedures for its obligations as it applies to "Duty to Warn" in the event a Client reveals a threat to self or others.

Standard 12 - The offeror has established processes and procedures for meeting the staffing requirements including hiring, training, and managing a staff of Masters level professionals (Masters Degrees in Social Work, Counseling Psychology, or other human services fields).

Standard 13 - The offeror's training program and methodology ensure staff members will be current on military services (Army, Navy, USMC, Air Force) specific issues and understand military terminology and the issues facing Service men and women and their dependents.

Subfactor b: Information and Referral: The Government will evaluate the offeror's processes and procedures, metrics, timeframes, and feedback mechanisms for providing and updating information and referral on the myriad of topics available through Military OneSource. The Government will evaluate the offeror's processes and procedures for document translation services.

Standard 1 - The offeror has processes and procedures in place to distribute information and referrals to Clients within the timeframes required.

Standard 2 - The offeror's provides document translation in a wide variety of languages.

Standard 3 - The offeror's management processes and procedures provide for the update of information and referral data.

Standard 4 - The offeror's management processes and procedures for gathering feedback to control quality of providers in the information and referral databases.

Subfactor c: Approach to Meeting Website Requirements: The Government will evaluate the offeror's compliance with Section 508 of the Workforce Investment Act of 1998 for both voice and data services. The Government will evaluate the offeror's ability to design a dynamic, easily navigated, and easily updated website reflecting a military appearance and themes that will meet established service levels defined in the 1-800/Website QASP for uptime availability and that will contain sufficient military content, locators, calculators, moderated topical chats on a scheduled basis, and self-assessment tools as specified in the basic PWS. The Government will evaluate how the offeror plans to ensure that the Military OneSource website is accessible without the use of passwords, while also allowing Clients the ability to register and personalize their Military OneSource site. The Government will evaluate the Information and System Security for the website and the disaster recovery approach and plan as specified in the basic PWS. The Government will review and evaluate the offeror's capability to offer downloadable information sheets and booklets to support the various content areas of Military OneSource as specified in the basic PWS. The Government will evaluate the offeror's capability to provide a website that is capable of handling significant spikes in usage. The Government will evaluate the offeror's capability to provide the website in both English and Spanish.

Standard 1 - The offeror has the management capability to design, implement and maintain multiple Websites that comply with Section 508 of the Workforce Investment Act of 1998; are available in both English and Spanish; provide calculators, moderated chats, and self assessment tools; and downloadable content.

Standard 2 - The offeror's management processes and procedures ensure a website that meets information and systems security requirements.

Standard 3 - The offeror's management processes and procedures provide for disaster recovery for the Military OneSource websites.

Factor 2: Approach to Providing Face-to-Face, Problem-Solving Counseling Services

Subfactor a: Running a large network of service providers: The Government will evaluate offeror's approach in operating a large network of appropriately credentialed service providers/counselors, including its ability to ensure proper credentialing at the state and local levels for all network providers and the method by which the offeror will monitor credentialing to ensure all federal, state, and local requirements are met and maintained. The Government will evaluate the offeror's processes and procedures for training the network of providers to assure sufficient knowledge of large clients and their specific

needs/requirements. The Government will evaluate offeror's processes and procedures for gathering feedback to control the quality of providers in the network. The Government will evaluate offeror's processes and procedures regarding handling of duty to warn incidents. The Government will evaluate the offeror's plan for identifying, prioritizing and handling of Emergency, Urgent and Routine requests for Face-to-Face, Problem-Solving counseling.

Standard 1 - The offeror has the management processes and procedures for tracking the credentialing activities to ensure all providers have appropriate licenses and credentials (Masters Degrees or above in Social Work, Counseling Psychology, Marriage and Family Therapy, etc. and licenses in the states in which they are practicing).

Standard 2 - The offeror has established management processes and procedures for primary source verification of network providers.

Standard 3 - The offeror's organization and provider network ensure the availability of adequate and qualified personnel to meet Client(s) usage requirements.

Standard 4 - The offeror has established processes and procedures for training a provider network.

Standard 5 - The offeror has established processes and procedures for gathering feedback on providers and assuring all providers provide quality service.

Standard 6 - The offeror has established processes and procedures for its obligations as it applies to "Duty to Warn" in the event a Client reveals a threat to self or others.

Standard 7 - The offeror's training program and methodology ensure providers will be current on military services (Army Navy, USMC, Air Force) specific issues and understand military terminology and the issues facing Service men and women and their dependents.

Standard 8 – The offeror has an established plan for the identification, prioritization and handling of Emergency, Urgent and Routine counseling requests that ensure those in the greatest need receive priority within established time frames.

Subfactor b: Response time: The Government will evaluate the offeror's ability to provide services within specified response times (service provider available within 30 minutes of Client; emergency, urgent, and routine case metrics, etc.). The Government will evaluate the offeror's plan for assuring that all case data are received from providers and provided to the 1-800/Website contractor within (3) business days of the final face-to-face, problem-solving counseling session.

Standard 1 - The offeror's processes and procedures provide for services within 30 minutes of Client's location.

Standard 2 - The offeror's processes and procedures assure timely appointments for emergency, urgent, and routine issues (urgent situations with appointments within one (1) business day; routine within three (3) business days).

Standard 3 – The offeror's processes and procedures provide for assurances that all case data from providers are received and transmitted to the 1-800/Website contractor within 3 business days.

Subfactor c: Crisis Response: The Government will assess offeror's corporate depth and capability to speedily react to crises with properly trained and professional staff, materials, information and referrals, etc. The Government will evaluate the offeror's management processes and procedures necessary to support all the activities associated with executing support within 48 hours when there is a crisis — telecommunications, case management, website, staffing (including providing teams of counselors who are available for special counseling assignments that may last 6 weeks).

Standard 1 - The offeror's organization and operational processes and procedures ensure their ability to respond to a CONUS crisis situation.

Factor 3: Interface with Government and Government Contractors The Government will evaluate offeror's approach to coordinating and for working closely with others supporting Quality of Life programs, including installations (e.g., Family Support Services) and other Government contractors. The Government will evaluate offeror's approach to working cooperatively with other contractors providing similar services, e.g., face-to-face counseling. The Government will evaluate the offeror's plans for interfacing with the Military Family Life Counseling Program. The Government will evaluate offeror's plan to recruit, hire, train, and manage Service Level Experts to work with Service and DoD points of contact. (POC).

Standard 1 - The offeror has a clear approach for working closely with other QOL contractors and Government agencies.

Standard 2 – The offeror has a clear approach for interfacing with the Military Family Life Counseling Program.

Standard 3 - The offeror has a plan for recruiting, hiring, training and managing Service Level Experts.

Standard 4 - The offeror's management processes and business practices account for early interaction with the customer to define requirements, policies, and procedures.

Standard 5 - The offeror's management processes and procedures demonstrate clear lines of authority; risk management systems; and allows for real-time or near real-time Government insight of program status

Factor 4: Quality Control Plan: The Government will evaluate offeror's Quality Control Plan in accordance with the Government's Quality Assurance Surveillance Plan. This plan shall demonstrate how it will meet the requirements of the RFP, to include a process for monitoring, collecting data, reporting and process improvements for all aspects of the Military OneSource program.

Standard 1 - The offeror's Quality Control Plan provides processes and procedures to support the monitoring and collection of metrics as defined in the QASP to allow the Government to accurately evaluate performance.

Factor 5: Recruitment and Retention: The Government will evaluate the offeror's procedures for recruiting, training, and retaining Military OneSource consultants.

Standard 1 - The offeror's proposal includes a professional compensation plan, the identification of key personnel positions and the credentials associated with those positions for both the 1-800/Website and Face-to-Face, Problem-Solving Counseling. Must meet the minimum qualifications as listed in Section 6.1 "Qualifications of Counselors" of the attached Performance Work Statement.

Standard 2 - Offeror's professional compensation plan sets forth proposed salaries and fringe benefits for professional employees proposed to work on the contract. The compensation levels proposed reflect a clear understanding of work to be performed and should indicate the capability of the proposed compensation structure to obtain and keep suitably qualified personnel to meet mission objectives

Factor 6: Transition: The Government will evaluate the offeror's capability and infrastructure to assure a seamless and smooth transition from the current vendor, including the plan for installing equipment and staff, with minimal interruption in service. The Government will evaluate offeror's infrastructure and systems for assuring a seamless and smooth transition of the toll free numbers, URLs and data from the current vendor. The Government will evaluate the offeror's ability to support the increase in call volume resulting from servicing an additional 4M Service members and their dependents. The offeror's proposal shall include a transition plan for

the transition and the identification of the risks associated with the transition. The offeror's proposal shall include offeror's plan for transitioning to a new vendor, including assumption of the facility lease, equipment, and furnishings and hiring, training and managing the care managers.

Standard 1 - The offeror has the existing technical infrastructure to support an increase in call volume resulting from surge issues, disasters, military contingencies, or changing dynamics in the GWOT.

Standard 2 - The offeror has the experience and capability to provide the technical infrastructure to establish and support a seamless transition from the current vendor.

Standard 3 - The offeror's technical infrastructure and systems have the capacity to support the Military OneSource toll free numbers.

Standard 4 - The offeror technical infrastructure and systems have the capacity to support the multiple Military OneSource Website URLs.

Standard 5 - The offeror's plan has processes, procedures, and timelines for the quick identification, hiring, and training of qualified key personnel with the credentials/skills required for those positions. The offeror's transition plan has a timeline for these personal to be fully operational.

Standard 6 - The offeror's plan for transition accounts for all components of the transition (including assumption of the lease) and provides for the risks associated with the transition, and the processes for mitigating these risks.

Standard 7 - Offeror's plan is realistic and thorough and provides for a smooth and seamless transition of all aspects of the 1-800/Website service (telecommunications; website; educational materials; fulfillment; user satisfaction, etc.) and Face-to-Face, Problem-Solving Counseling service with no interruption in Service and provides for the risk associated with the transition and the processes for mitigating these risks.

Standard 8 - Offeror's plan has processes, procedures, and a timeline for the case management system to be fully operational, including processes and procedures for getting into the case management system. The offeror's plan accounts for access to the case management system by other designated QOL Government and contractor personnel. The plan provides for testing the system and training all appropriate Military OneSource staff on its use.

Standard 9 - Offeror's plan describes processes, procedures and a timeline for the design, development, and implementation of a website that meets requirements.

Factor 6: Oral Presentations (If Required)

6.1 Only those offerors the CO determined to be in the competitive range, if one is established, will be invited to participate in oral presentations of their proposals, if required. This presentation shall serve to augment the ratings for the criteria contained in the written proposal. The CO will establish the competitive range in accordance with the Federal Acquisition Regulation (FAR) 15.306.

6.2 Offerors will be required to present their technical proposal orally at oral presentations in metro Washington, DC area (exact location is to be determined). The oral presentation shall serve to augment the ratings for the criteria contained in their technical proposal. The contracting officer will inform each offeror of the exact time, date, location, and additional instructions prior to the oral presentation. The timing for the presentation will be determined via a random lottery selection with no preference given to any offeror involved. The offeror will have no more than 60 minutes to make their presentation. A question and answer session may take place following the offeror's presentation. Price shall not be discussed at oral presentations. A hard copy of the offeror's oral presentation shall be submitted if the CO deems oral presentations are required. No changes shall be made to the oral presentation after the

submission of hard copy; doing so will result in disqualification of the offeror from this competition. A screen for PowerPoint viewing will be available, upon request. However, all other electronic materials must be supplied by the offeror.

Area C: Subcontracting

Factor 1: Small Business Participation/Subcontracting Plan: The Government will evaluate the offeror's Small Business Participation Plan. The Government will evaluate the offeror's Small Business goals, its understanding of DoD's goals for small business concerns, particularly for Ability One, Service Disabled Veteran Owned Businesses and Veteran Owned Businesses, and ability to meet or exceed these goals. These goals apply to the total contract value. The Government will evaluate the offeror's Small Business Subcontracting Plan, including teaming arrangements, conforming to the requirements of FAR subpart 19.7 unless exempted pursuant to FAR 19.702(b) (1).

Standard 1 - The offeror's small business participation plan articulates a realistic strategy for maximizing the use of small business participation to meet or exceed DOD's goals for small business concerns, particularly for Ability One, Service Disabled Veteran Owned Businesses and Veteran Owned Businesses.

Standard 2 - The offeror's small business participation/subcontracting plan demonstrates understanding and commitment to achieving DoD's small business goals.

Standard 3 – The complexity and variety of the work small business concerns are to perform.

Standard 4 – The extent of participation of small business concerns in terms of the value of the total acquisition

Standard 5 – Past performance of offerors in complying with subcontracting plan goals and monetary targets for small business participation

Factor 2: Subcontract Management: The Government will evaluate the offeror's Subcontracting Management Plan to include teaming arrangements and processes for selecting, directing, coordinating, integrating, and controlling potential subcontracted efforts. The Government will evaluate the offeror's prior experience in meeting their small business commitments.

Standard 1 - The offeror has a subcontracting management plan, including teaming arrangements, that is defined and includes interrelationships that address management/technical decision making, information sharing, problem resolution, and performance monitoring.

Standard 2 – The offeror's small business participation/subcontracting plan clearly defines interrelationships that address management/technical decision making, information sharing, problem resolution, and performance monitoring.

Standard 3 - The offeror has established processes and procedures for distributing work to small business team members, including the management of working data and lessons learned feedback.

Factor 3: Oral Presentations (If Required)

3.1 Only those offerors the CO determined to be in the competitive range, if one is established, will be invited to participate in oral presentations of their proposals, if required. This presentation shall serve to augment the ratings for the criteria contained in the written proposal. The CO will establish the competitive range in accordance with the Federal Acquisition Regulation (FAR) 15.306.

3.2 Offerors will be required to present their technical proposal orally at oral presentations in metro Washington, DC area (exact location is to be determined). The oral presentation shall serve to augment the ratings for the criteria contained in their technical proposal. The contracting officer will inform each offeror of the exact time, date, location, and additional instructions prior to the oral presentation. The timing for the presentation will be determined via a random lottery selection with no preference given to any offeror involved. The offeror will have no more than 60 minutes to make their presentation. A question and answer session may take place following the offeror's presentation. Price shall not be discussed at oral presentations. A hard copy of the offeror's oral presentation shall be submitted if the CO deems oral presentations are required. No changes shall be made to the oral presentation after the submission of hard copy; doing so will result in disqualification of the offeror from this competition. A screen for PowerPoint viewing will be available, upon request. However, all other electronic materials must be supplied by the offeror.

Area D: Past Performance: The offeror will be evaluated (1) on its relevant and recent past performance in the provision of services similar in nature, size, and complexity to the Military OneSource Program, (2) the information provided in response to the Past Performance Questionnaire and Customer Survey (Attachment 2), and (3) other government sources. The Government has multiple sources of past performance data, including the offeror's past performance volume, Past Performance Questionnaire responses, Government and/or commercial databases, and Government interviews with past clients.

The Government will perform a performance risk assessment for each offeror based upon the relevancy and quality of the offeror's past performance (and proposed subcontractors) as it relates to the probability of successful accomplishment of the required effort. When assessing performance risk, the Government will focus its inquiry on the offeror's (and proposed subcontractors') past performance as it relates to this solicitation.

The Government expects the offerors to provide relevant past performance project information, to explain the relevance and applicability of these projects, and to relate past project accomplishments to this solicitation's PWS and objectives.

D.1 Data from other sources

In the course of due diligence, the Government may seek, obtain, and use offeror past performance data from other sources. However, the Government is under no obligation to complete the Offeror's performance information. It is the offeror's burden to provide a thorough and complete past performance proposal.

D.2 Verifying Proposal Data

The Government may contact the offeror's sponsors or clients to verify proposal information to include type of work performed, contractor accountability, prices, and completion dates. However, the Government may not necessarily interview all of the offerors references. Therefore, it is incumbent upon the offeror to explain the relevance of the information provided.

D.3 Invalid Information

If client past performance questionnaire contact information is not valid, the Government may elect to not consider the assessment in the past performance evaluation.

D.4 Lack of Past Performance Project Data

If an offeror does not have any past projects whose performance is relevant to the solicitation, the Government will assess the offeror's Past Performance Risk as Neutral, which is neither favorable nor unfavorable. However, an offeror's proposal with no relevant Past Performance history, while evaluated as Neutral in Past Performance, may not represent the most advantageous proposal to the Government and thus, may be an unsuccessful proposal when compared to the proposal of other offerors.

However, the Government requires the offeror to provide and the Government will consider the offeror's explanation as to why the company does not have any relevant past project performance and/or experience related the scope of the work defined in the PWS and the solicitation.

The Government considers offerors with good performance on relevant past projects a lower performance risk than offerors with no relevant past projects. On the other hand, the Government considers offerors with poor performance on past projects a higher performance risk than offerors with no relevant past projects.

D.5 Past Performance References

The Government will evaluate the responses for at least three but no more than five past performance references. The Government requires the offerors' references to return their completed questionnaire directly to the Government. The Government will not accept reference questionnaires from an offeror. The Government may contact the offeror's references to clarify proposal information to include type of work performed, contractor accountability, prices, and performance.

D.6 Other Past Performance Project Data Considerations

The Government may evaluate as deficient if offeror has relevant past performance projects, but fails to cite them in the proposal.

A significant achievement, problem, or lack of relevant data in any element of the scope of work can become an important consideration in the evaluation process. Specifically, poor past performance for any area may result in a higher overall performance risk rating. In such cases, offerors should describe relevant mitigating efforts, especially those demonstrating corrective actions or acceptable client solutions.

The Government might consider key personnel, staff, or subcontractor involvement in an offeror's successful past performance project as a basis for improved performance risk ratings or as a basis to mitigate performance risk issues. The Government may permit offerors to explain and/or clarify negative past performance information, from any source, or to clarify the relevance of past performance cited in the proposal.

D.7 Past Performance Risk Assessment

The Government will evaluate the relevance of past performance references based upon applicability of the offeror's proposed approach to task order requirements, including but not limited to size, scope, or operational complexity. The Government will evaluate the offeror's past performance using the assessment scale in Section M5.

D.8 Past Performance Evaluation Standards

The Government will evaluate the offeror's (1) effectiveness of program management, (2) quality of service and improvement, (3) cost control abilities, and (4) the offeror's responsiveness to customers.

Standard 1 - The offeror's past performance provides assurance that offeror has recent and relevant experience sufficient to determine performance risk for capabilities in each applicable area

Standard 2 - Offeror has demonstrated capabilities for all requirements within the RFP.

Standard 3 - Offeror's client/user satisfaction ratings can meet QASP standards.

Standard 4 - Offeror demonstrates ability to ensure customer satisfaction, quality service, cost control, and an ability to meet delivery schedules and performance goals.

Standard 5 - Offeror's provider network experience provides confidence that offeror can meet the standards outlined in the QASP

Standard 6 - Offeror has demonstrated that it has successfully adopted and applied the principles and techniques of continuous systemic improvement in resolving past performance problems.

Area E: Cost/Price:**GENERAL**

a. The Government will evaluate cost/price provided in Section B and information found in any other section of the proposal that may aid in cost/price evaluation. The Government will evaluate the quality of the offeror's price proposal in light of the PWS and other solicitation instructions and guidance. More specifically, the Government will evaluate the offeror's price proposal with respect to completeness, fairness, reasonableness, realism, and balance. The Government will evaluate if the offeror's technical and management approach are consistent with costs presented in the offeror's cost proposal. The Government will review the offeror's costs for reasonableness, affordability, and realism to determine whether they reflect an understanding of Government objectives or if they contain apparent mistakes. The Government defines the total price as the sum of the services and related costs over the term of the contract, including all option periods.

b. Each Offeror's price proposal will be evaluated to determine if it is complete, consistent, and reasonable with the Offeror's technical approach and reflects a clear understanding of the solicitation requirements. Inconsistencies between the Technical and Price Proposals, unbalanced pricing, or other pricing anomalies may be assessed as proposal risk under the Technical evaluation or as a Price Area concern regarding increased risk of additional Government costs during contract execution. As part of this evaluation, the Government may consider commercial published data, same or similar DoD contracts, Government estimates, industry standards, DCAA audit information, and other information the Government deems relevant

c. The Firm Fixed Price (FFP) Schedule B CLINs Total Price is equal to the proposed unit price multiplied by the Section B Quantity for that CLIN. For Time and Materials (T&M) CLINs, the Government Total Evaluated Price is defined as the sum of all of the Government evaluated costs for all Schedule B CLINs for the Base Period and all Option Periods. It should be noted CLIN 0001 Transition In, CLIN 0003A Website Development, and CLIN 0008 facility lease **will not** be included in the price evaluation.

d. The Government will evaluate the offeror's labor rates, startup and implementation costs, the day-to-day operations costs and related costs the contractor found necessary for operations, for all program years.

e. The Government will also evaluate proposed percentages for any fees associated with any cost item, to include, but not limited to the percentages for materials handling and pass through.

BEST VALUE

a. The price evaluation will be based on the offeror(s) whose proposal(s) represents the BEST OVERALL VALUE to the Government based on the areas and factors set forth herein Section M, which may not be the lowest cost. The importance of price as an evaluation factor will increase with the degree of non-price factors equality among competing proposals. When the proposal with the lowest evaluated price is other than the proposal that has the highest rated non-price evaluation, a price/non-price tradeoff is necessary. The Government will use best value analysis to perform this tradeoff, if necessary.

b. The degree of importance allocated to cost will increase with the degree of equality of the proposals in relation to the other factors on which selection is to be based, or decrease when the cost is so significantly high as to diminish the value of the technical superiority to the Government

c. The Government reserves the right to make an award to other than the lowest priced offeror or to the offeror with the highest technical rating if the Source Selection Authority (SSA) determines that to do so would result in the greatest value to the Government.

COST REALISM

Cost realism analysis evaluation technique will be used. Costs will be evaluated on the basis of cost realism. Cost realism pertains to the offeror's ability to project costs which are reasonable and which indicate that the offeror understands the nature of the work to be performed. Any understatement or overstatement of costs may be

considered a reflection of a lack of understanding of the work required and may be considered in the management or technical analysis, which could reduce the management or technical rating. With regard to any understatement of costs, the Government reserves the right to evaluate the cost proposals on the inclusion of all necessary and verifiable items of cost. Any proposal which is materially unbalanced as to prices may be rejected as non-responsive. An unbalanced proposal is one, which is based on prices significantly less than cost for some work and prices which are significantly overstated for other work.

AWARD WITHOUT DISCUSSIONS

The Government may award a contract on the basis of initial offers received without discussions. Therefore each initial offer should contain the offeror's best terms from a cost or price and technical standpoint. However, if considered necessary by the Contracting Officer, discussions will be conducted with only those offerors within the competitive range.

M.5 COMPLIANCE RATINGS AND RISK ASSESSMENT

The ratings reflect the Government's assessment of solicitation compliance and the expected results, based on the offeror's proposed approach.

For Areas A (Technical Approach), B (Management Approach), and D (Past Performance), the following evaluation ratings and corresponding definitions apply:

Rating	Definition
Outstanding (O)	Proposal significantly exceeds requirements in a way that benefits the Government or meets requirements and contains at least one exceptional enhancing feature, which benefits the Government. Any weakness is minor.
Highly Satisfactory (HS)	Proposal exceeds requirements in a way that benefits the Government or meets requirements and contains enhancing features, which benefit the Government. Any weakness is minor.
Satisfactory (S)	Proposal meets requirements. Any weaknesses are minor and will have little or no impact on contract performance.
Marginal (M)	Proposal contains weaknesses or minor deficiencies, which could have some impact if accepted.
Unsatisfactory (U)	Proposal does not comply substantially with requirements.

For Area C (Subcontracting Plan) only, the following evaluation ratings and corresponding definitions apply:

Rating	Definition
Outstanding (O)	Proposal significantly exceeds requirements in a way that benefits the Government or meets requirements and contains at least one exceptional enhancing feature, which benefits the Government. Any weakness is minor. Offerors must exceed any two DoD goals for any small business concern OR meet three or more DoD goals for any small business concern OR meet all three of the following DoD goals: Ability One or Service Disabled Veteran Owned Business or Veteran Owned Business goals
Highly Satisfactory (HS)	Proposal exceeds requirements in a way that benefits the Government or meets requirements and contains enhancing features, which benefit the Government. Any weakness is minor. Offerors must meet any two DoD goals for any small business concern OR exceed one of the following DoD goals: Ability One or Service Disabled Veteran Owned Business or Veteran Owned Business goals.
Satisfactory (S)	Proposal meets requirements. Any weaknesses are minor and will have little or no

	impact on contract performance. Offerors must meet one of the following DoD goals: Ability One or Service Disabled Veteran Owned Business or Veteran Owned Business goals OR double any one DoD goal for any small business concern.
Marginal (M)	Proposal contains weaknesses or minor deficiencies, which could have some impact if accepted.
Unsatisfactory (U)	Proposal does not comply substantially with requirements.
Neutral (N)	Unknown

Proposal Risk Rating (applies to Areas A, B, and C) - Assesses the risk associated with the offeror's proposed approach as it relates to accomplishing the requirements of the solicitation.

Rating	Definition
Low (L)	Has little or no potential to cause disruption of schedule, increase in cost, or degradation of performance. Normal contractor effort will probably be able to overcome difficulties.
Medium (M)	Can potentially cause some disruption of schedule, increase in cost, or degradation of performance. However, special contractor emphasis will probably be able to overcome the difficulties.
High (H)	Likely to cause significant serious disruption of schedule, increase in cost, or degradation of performance even with special contractor emphasis.

Past Performance Risk (applies to the Past Performance Area D) - Assesses the likelihood that the offeror will successfully complete the solicitation requirements based on previously demonstrated relevant performance.

Rating	Definition
Low (L)	Based on the offeror's performance and systemic improvement record, little doubt exists that the offeror will successfully perform the required effort.
Moderate (M)	Based on the offeror's performance and systemic improvement record, some doubt exists that the offeror will successfully perform the required effort.
High (H)	Based on the offeror's performance and systemic improvement record, substantial doubt exists that the offeror will successfully perform the required effort.
Neutral (N)	No performance record identifiable. This applies only to Past Performance.

M.6 PROPOSAL RISK ASSESSMENT

The Government will make an overall proposal risk assessment. The overall assessment for the proposal will be derived from a consolidation of individual risk assessments made for each factor. General considerations include adequacy and feasibility of the offeror's approach and the offeror's understanding of, and compliance with the requirements and objectives of the Request for Proposal.